

## Canadian Personal Tax Return (T1) Checklist

**For the year: 20** \_\_\_

Description	You	Spouse
Name:		
Date of Birth (MM/DD/YYYY):		
Social Insurance Number (SIN):		
Citizenship:		
Marital Status:	Married	Separated
	Common Law	Divorced
	Widowed	Single
Is there a change in Marital Status in the current year?	Yes	Yes
	No	No
<b>If yes, then state the Date of Change (MM/DD/YYYY):</b>		
Street Address:		
City/Town, Province:		
Postal Code:		
Is this your New/Current Address for the current year?	Yes	Yes
	No	No
<u>If not, then please state the New/Current Address</u>		
Street Address:		
City/Town, Province:		
Postal Code:		
E-mail Address:		
Telephone	Cell:	
	Home:	
	Work:	

Yes

Yes

No

No

Are we preparing a Tax Return for your Spouse?

**If you have selected No, then please provide us with the following information**

Universal Child Care Benefits of his/her Tax Return: \_\_\_\_\_

Net Income Figure of his/her Tax Return: \_\_\_\_\_

Do you qualify for Disability Tax Credit?

Yes

Yes

No

No

**If Yes, then Please indicate whom**

Dependent Name	Relationship	Date of Birth (MM/DD/YYYY)	SIN	Disability, if any	Net Income for the recent year
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Do you own/hold foreign property with a total cost of more than CAD \$1,000,000?

Yes

Yes

No

No

Do you authorize CRA to provide information about you to Elections Canada?

Yes

Yes

No

No

**If you have selected yes, then please attach a void cheque.**

Notes:

## Sources of Income

(Please check if you have any of the following sources of income)

Description	Checkbox	Slip to Attach or Amount
Previous Year's Notice of Assessment & Tax Return (If we are preparing your tax return for the first time)	_____	Copy of Notice & Tax Return
<p>(For Carry Forward detail of Loss, Tuition Fees, Donation, &amp; RRSP)            Alternatively, please contact our office to obtain a T1013 to sign, in order for us to retrieve this information from CRA</p>		
<b><u>Current Sources</u></b>		
Employment Income	_____	T4
Pension Income (Including Scholarship & Bursaries, Taxable Disability, RRIF Income & Withdrawals)	_____	T4A, T4AP, T4RIF, T4RSP
Old Age Security	_____	T4 (OAS)
Employment Insurance Benefits	_____	T4E
Income from Trust	_____	T3
Investment Income	_____	T5
Workmen Compensation or Social Assistance Payments	_____	T5007
Universal Child Care Benefit	_____	RC62
Profit Sharing Income	_____	T4PS
Limited Partnership Income	_____	T5013
Sale of Securities (Trading Summary of Broker)	_____	Summary sheet
Spouse/Taxable Child Support Payment Received	_____	
Business/Self-Employed Income	_____	Detail in Other Forms
Sale of Investments	_____	Detail in Other Forms
Rental Income	_____	Detail in Other Forms
Sale of Real Estate	_____	Detail in Other Forms
Others (if any please state)	_____	
_____	_____	
_____	_____	
_____	_____	
_____	_____	

## General Deductions & Tax Credits Available

(Please check if you have any of the following deductions)

Description	Checkbox	Slip to Attach or Amount
RRSP Contributions	_____	_____
Medical, Dental, Prescription Drugs, & Nursing Home Expenses	_____	_____
Union Dues & Professional Dues (including Investment Counselling Fees)	_____	_____
Private Health Insurance Plan Contributions	_____	_____
Charitable Donations Receipts	_____	_____
Tuition Fees (Self/ Spouse/Children)	_____	T2202A
Interest Paid on Student Loans	_____	_____
Public Transit Pass	_____	_____
Children's Physical Fitness & Arts Amount	_____	_____
Interest on Loan taken for Investments	_____	_____
Safety Deposit Box Fees	_____	_____
Legal Fees to establish Child/Spouse Support	_____	_____
Legal Fees to recover Wages from Employer	_____	_____
Child Care Expenses	_____	_____
Moving Expenses if you moved 40km or Closer to work or School	_____	_____
Political Contributions (Federal/Provincial) Receipts	_____	_____
Disability Tax Credit Claim Form completed by Authorized Health Practitioner	_____	_____
First Time Home Buyer's Amount	_____	_____
Home Buyers Plan Withdrawals/Payments	_____	_____
Spouse Support Payments paid	_____	_____
Adoption Expenses	_____	_____
Property Tax or Residential Rent paid and to whom paid	_____	_____